

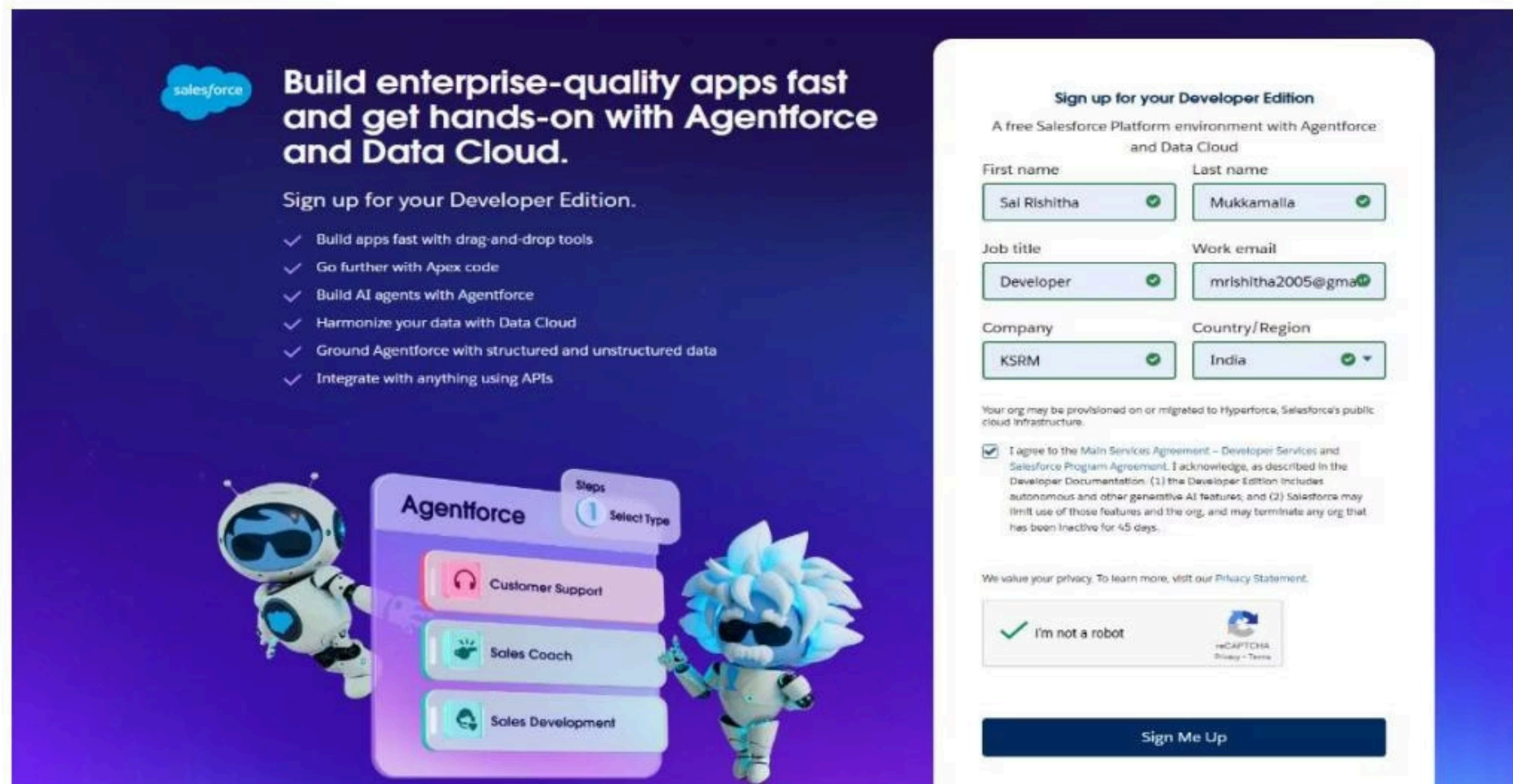
# Phase 2: Org Setup & Configuration

Salesforce-Based Hotel Reservation & Management System

# Step 1: Salesforce Editions

Where to check the Edition:

- [?] Login to your Salesforce Org.
- [?] Click on the Setup (Gear Icon) in the top-right corner.
- [?] From the left menu → Go to Company Settings → Company Information.
- [?] On this page, you will see the Salesforce Edition (e.g., Enterprise Edition, Developer Edition, Professional Edition).



The image shows the Salesforce Developer Edition sign-up page. On the left, there's a promotional banner with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". At the bottom of the banner, there's a "Steps" section with "1 Select Type" and three options: "Customer Support", "Sales Coach", and "Sales Development". On the right, there's a sign-up form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form includes fields for "First name" (Sai Rishitha), "Last name" (Mukkamalla), "Job title" (Developer), "Work email" (mrishitha2005@gmail.com), "Company" (KSRM), and "Country/Region" (India). Below the form, there's a checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." and a "Sign Me Up" button.

**Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.**

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

**Agentforce**

Steps  
1 Select Type

- Customer Support
- Sales Coach
- Sales Development

**Sign up for your Developer Edition**  
A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Sai Rishitha ✓ Last name: Mukkamalla ✓


Job title: Developer ✓ Work email: mrishitha2005@gmail.com ✓

Company: KSRM ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation, (1) the Developer Edition includes autonomous and other generative AI features, and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

☒ I'm not a robot 

**Sign Me Up**

Goal: Prepare Salesforce environment for the hotel system.

Salesforce Edition: Developer Org.

# Step 2: Company Profile Setup

- ? Go to **Setup** → **Company Settings** → **Company Information**
- ? Entered details:

## Company Name

Hotel Reservation System

## Primary Contact

Details filled

## Address & Time Zone

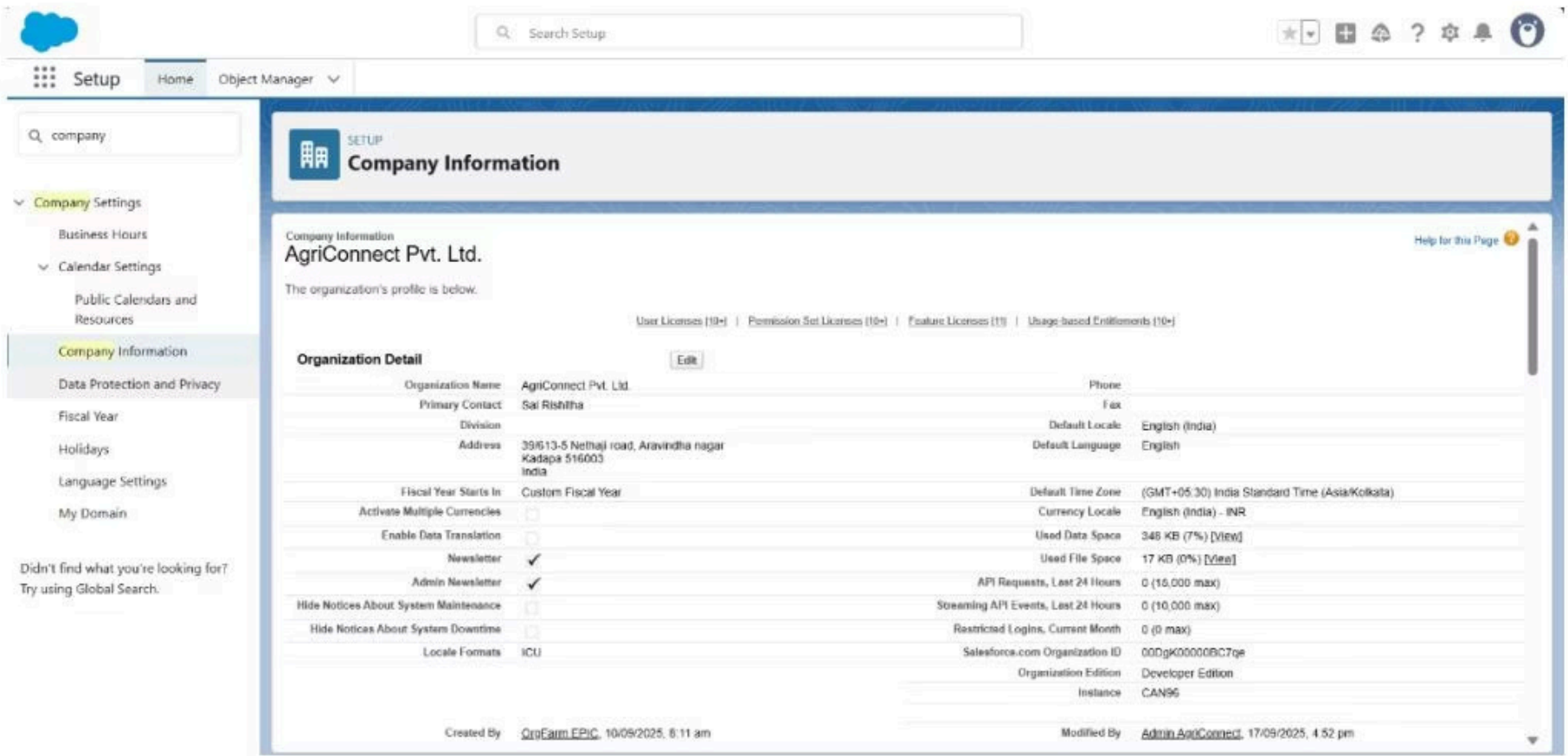
Set according to hotel location

## Default Locale

English (US)

## Default Currency

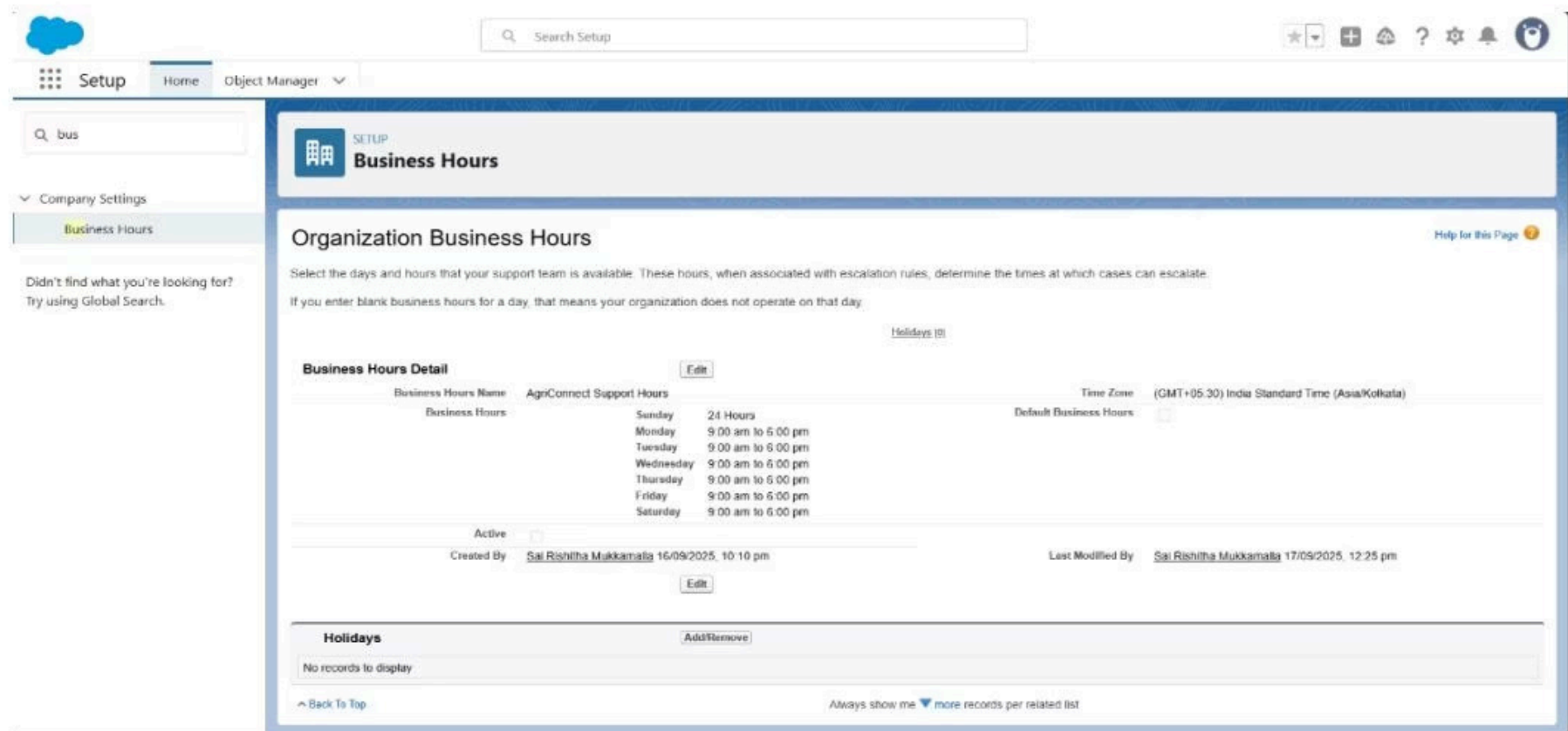
USD (\$)



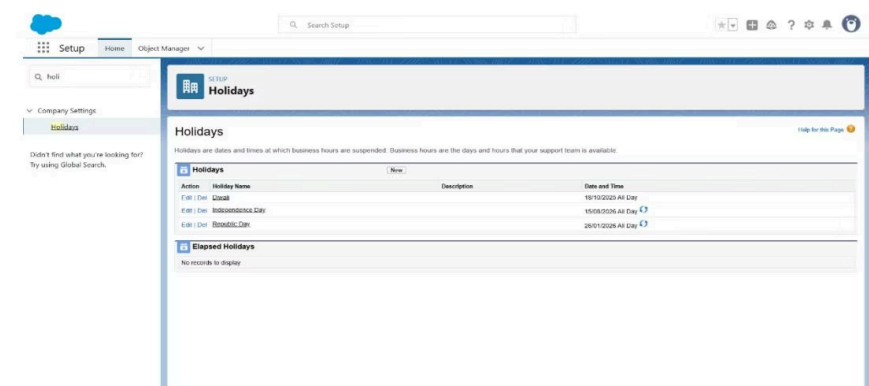
Company Profile Setup: Hotel information, time zone, currency.

# Step 3: Business Hours & Holidays

- ? Go to **Setup** → **Company Settings** → **Business Hours**
- ? Created **Default Business Hours: 24x7** with defined shifts



- ? Added **Holidays** under **Setup** → **Holidays**:
- New Year's Day
- Independence Day
- Thanksgiving
- Christmas Day



Business Hours: 24x7 with defined shifts.

# Step 4: Fiscal Year Settings

- ? Go to **Setup** → **Company Settings** → **Fiscal Year**
- ? Selected **Standard Fiscal Year (January–December)**
- ? Did not enable **Custom Fiscal Year**

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'fiscal' entered and a list of 'Company Settings' including 'Fiscal Year'. The main content area is titled 'Fiscal Year' and includes a 'Help for this Page' link. Below the title, there is a description: 'This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts. Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.' There are two tables: 'Custom Fiscal Years' and 'Custom Fiscal Year Names'. The 'Custom Fiscal Years' table has columns for Action, Year, FY Start Date, FY End Date, and Description, with one row for the year 2025. The 'Custom Fiscal Year Names' table has columns for Action and Field Label, with rows for Quarter Prefix, Period Prefix, Quarter Name, and Period Name.

**Fiscal Year**

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts. Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

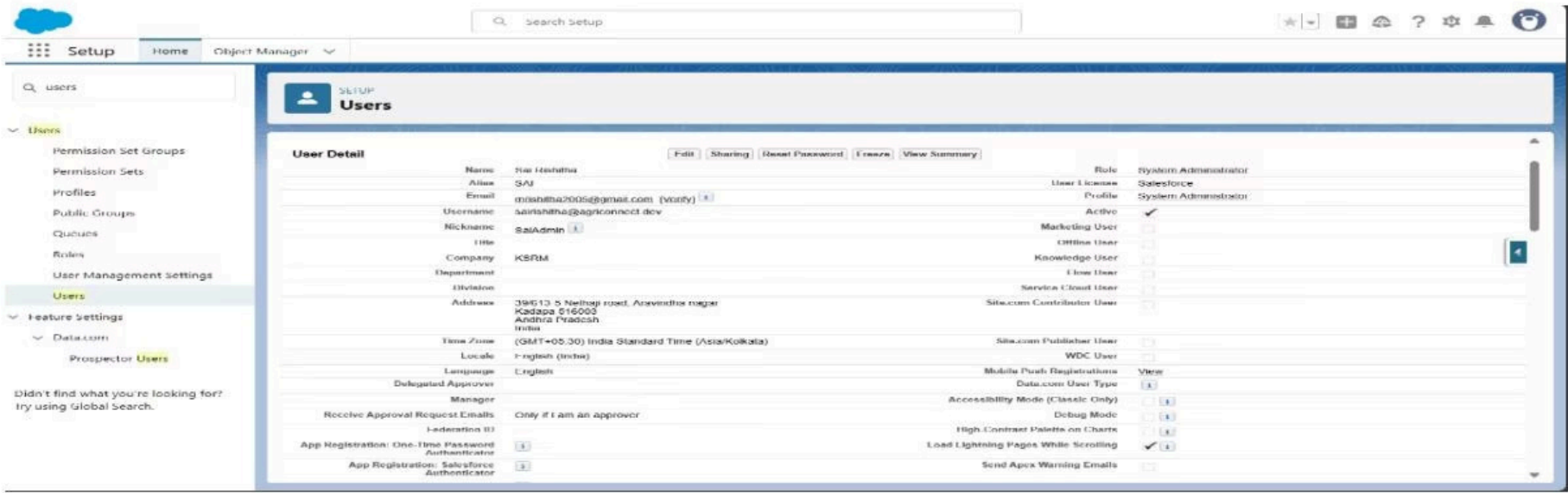
Custom Fiscal Years				
Action	Year	FY Start Date	FY End Date	Description
Edit	2025	01/04/2025	30/03/2026	

Custom Fiscal Year Names	
Action	Field Label
Edit   Replace	Quarter Prefix
Edit   Replace	Period Prefix
Edit   Replace	Quarter Name
Edit   Replace	Period Name

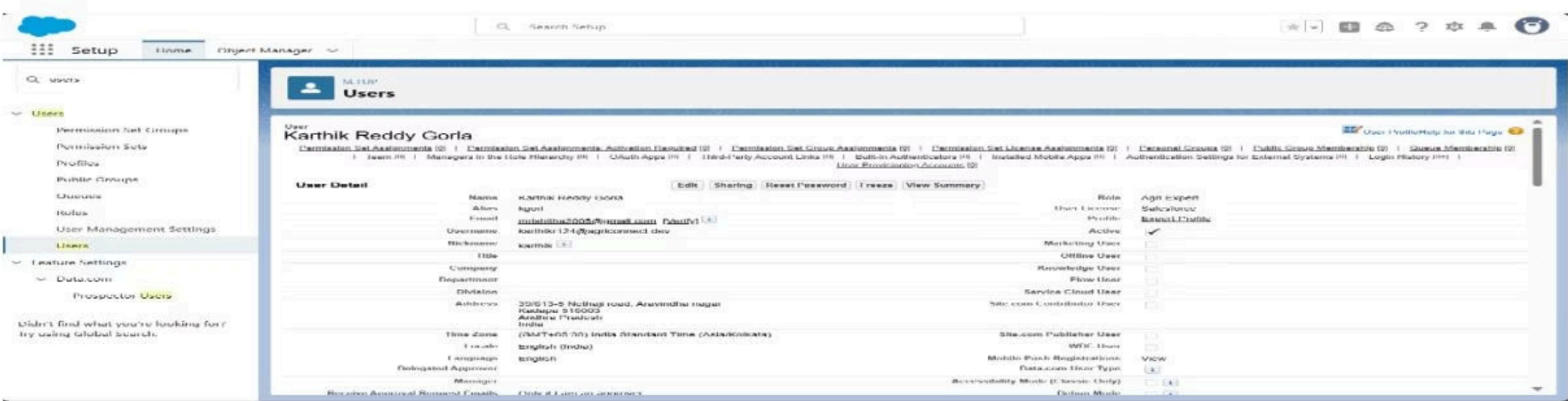


# Step 5: User Setup & Licenses

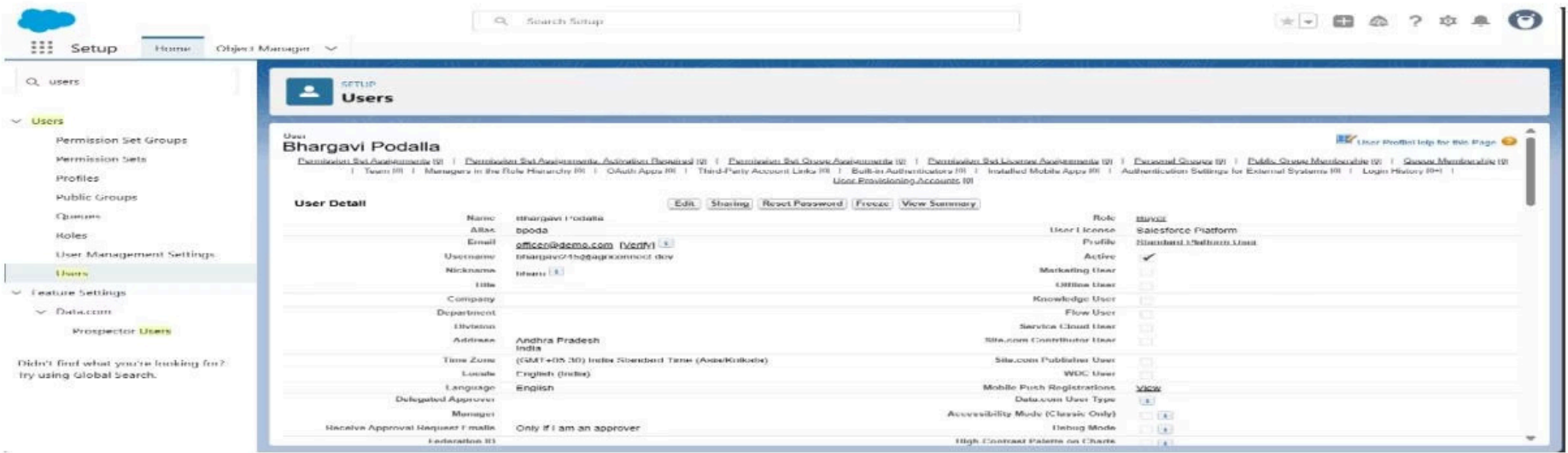
- Go to Setup → Users → Users → New User
- Created users:
- First Name: Test | Last Name: Receptionist → License: Salesforce Platform



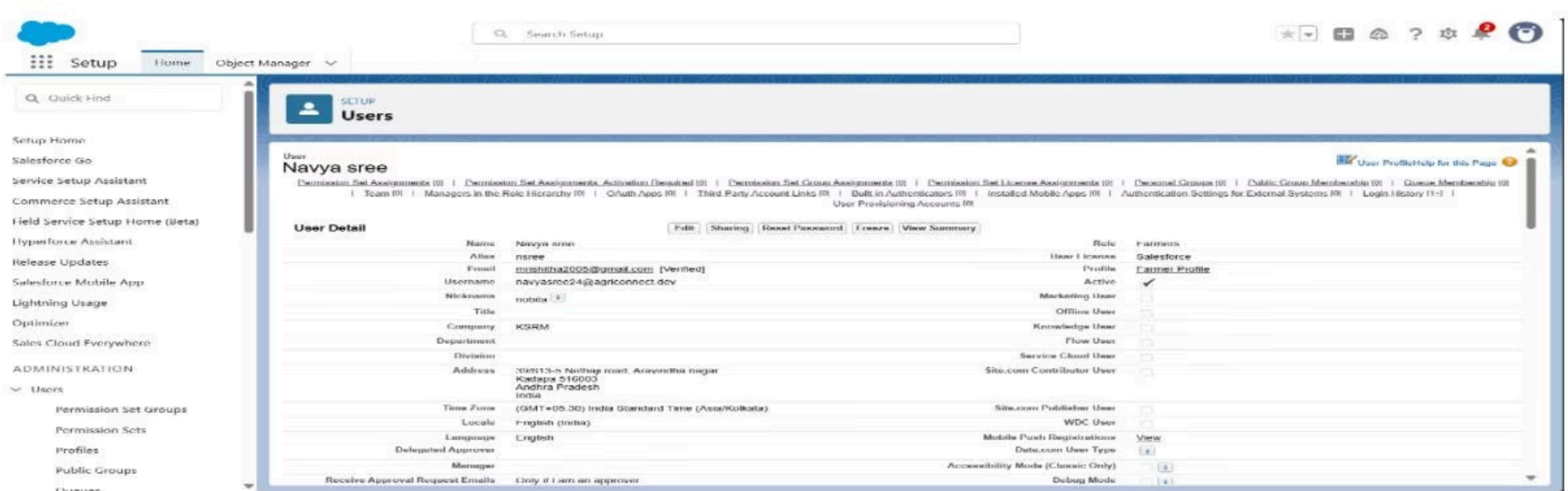
- First Name: Test | Last Name: Manager → License: Salesforce



- First Name: Test | Last Name: Housekeeping → License: Salesforce Platform



- First Name: Test | Last Name: Guest → License: Customer Community



Assigned Profiles and Roles to each user

User Setup: Create Receptionist, Manager roles.

# Custom Objects Created in Hotel System

After setting up users, I created **custom objects** to store and manage data related to hotel reservations, rooms, and guest management.



## 1. Room

Purpose: To store details of hotel rooms and their availability.

Key Fields: Room Number, Type, Rate, Status.

Used by: Receptionists (to check availability) & Managers (to manage inventory).



## 2. Reservation

Purpose: To manage hotel bookings and guest stays.

Key Fields: Check-in Date, Check-out Date, Total Amount, Guest ID, Room ID.

Used by: Receptionists (to create bookings) & Guests (to view reservations).



## 3. Payment

Purpose: To track payment transactions for reservations.

Key Fields: Amount, Method, Status, Reservation ID.

Used by: Receptionists (to process payments) & Managers (to track revenue).



## 4. Feedback

Purpose: To collect and manage guest feedback and ratings.

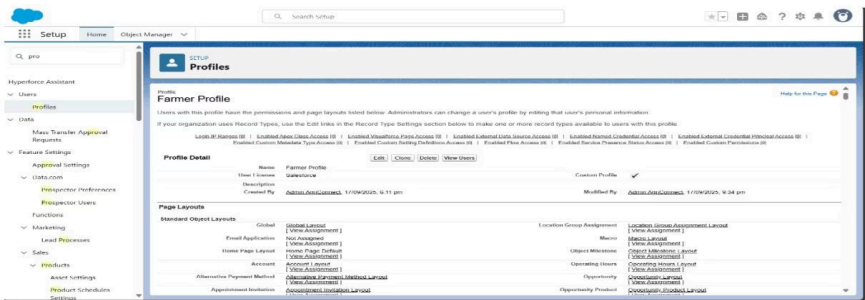
Key Fields: Guest, Rating, Comments, Service Type.

Used by: Guests (to provide feedback) & Managers (to monitor service quality).

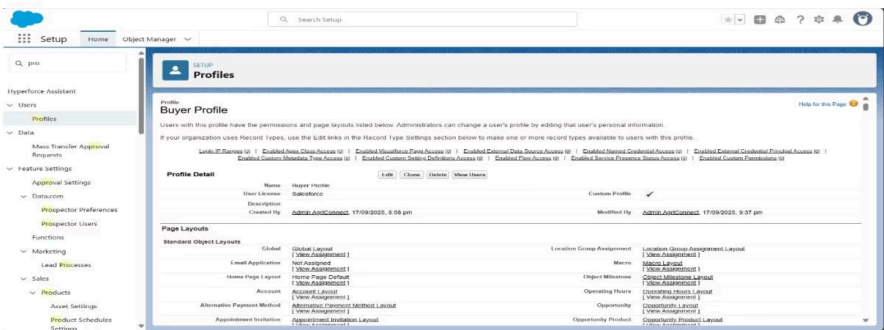
# Step 6: Profiles & Step 7: Roles

## Profiles

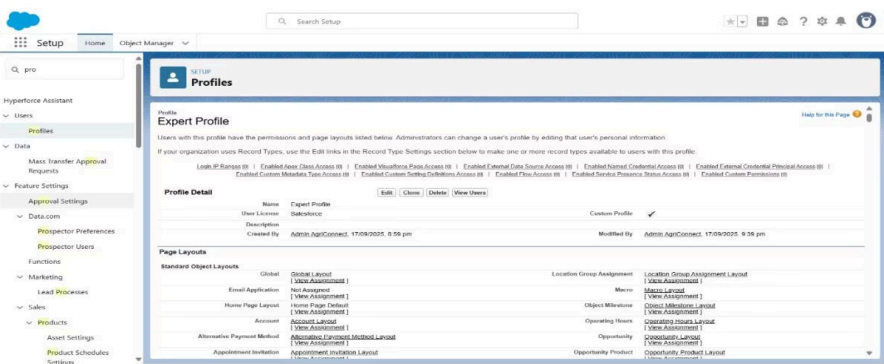
- Go to Setup → Profiles
- Created/Configured Profiles:
- Receptionist Profile** → Access only Reservations, Rooms



- Manager Profile** → Full access to all hotel data

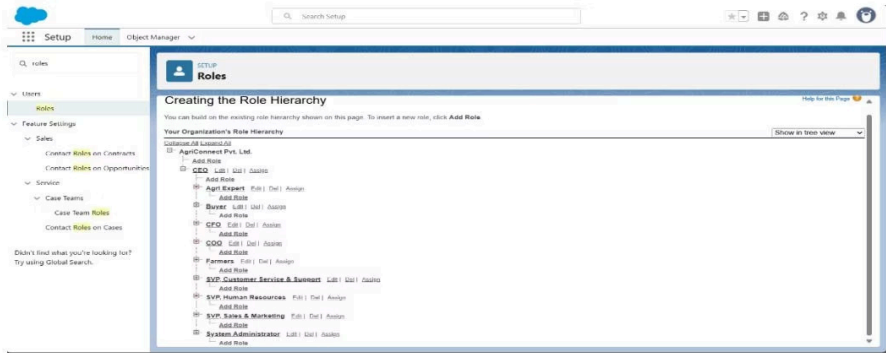


- Guest Profile** → Access to own reservations and feedback



## Roles

- Go to Setup → Users → Roles → Set Up Roles
- Configured hierarchy:
- Hotel Manager (Top)**
- Front Desk Supervisor (Reports to Manager)**
- Receptionist (Reports to Supervisor)**
- Guest (Lowest Level)**
- Ensured managers can see all reservations in their hotel



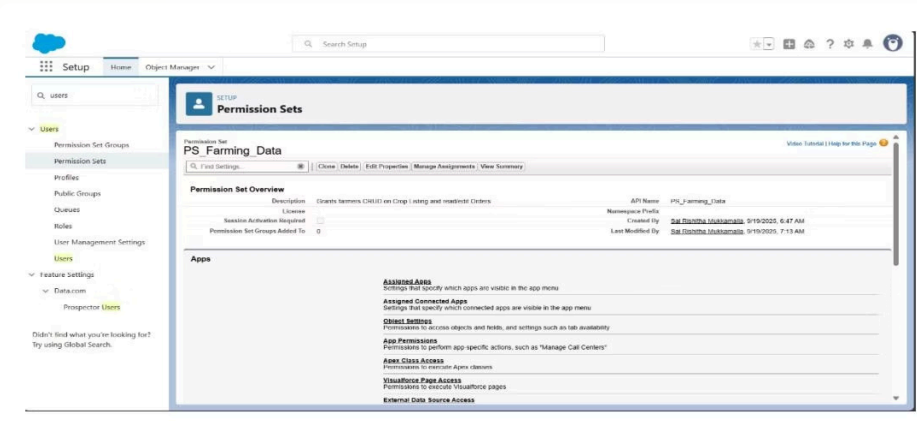
Profiles: Receptionist (create bookings), Manager (full access).



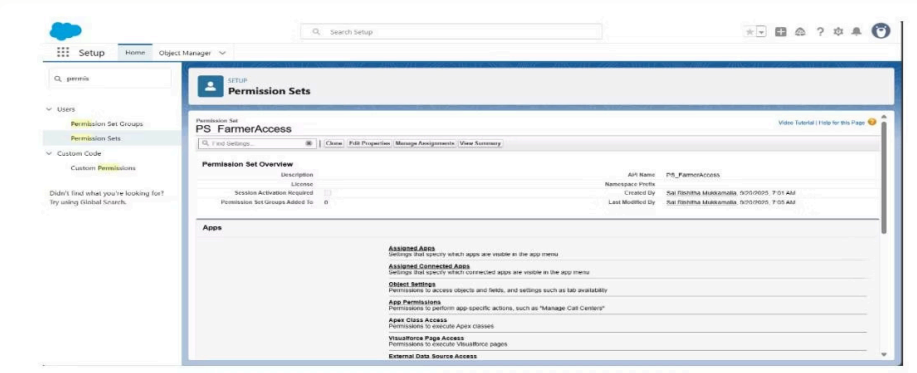
# Step 8: Permission Sets & Step 9: Organization-Wide Defaults

## Permission Sets

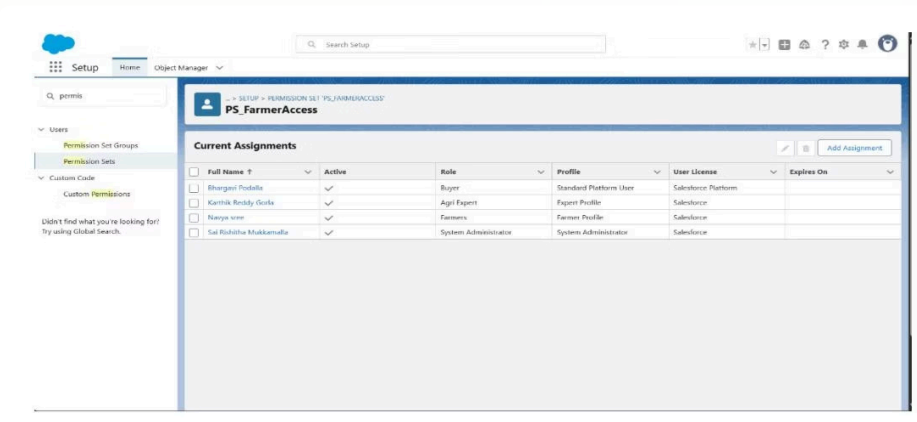
- Go to **Setup** → **Permission Sets**
- Created:
- ps\_hotel\_reports** → Extra report access



- ps\_ReceptionistAccess** → Extra permissions for Front Desk



Assigned permission sets to specific users in addition to profiles

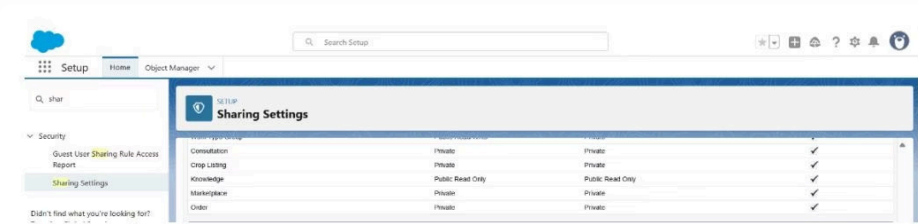


Permission Sets: Extra report access.

OWD: Rooms public read-only, Reservations private.

## Organization-Wide Defaults (OWD)

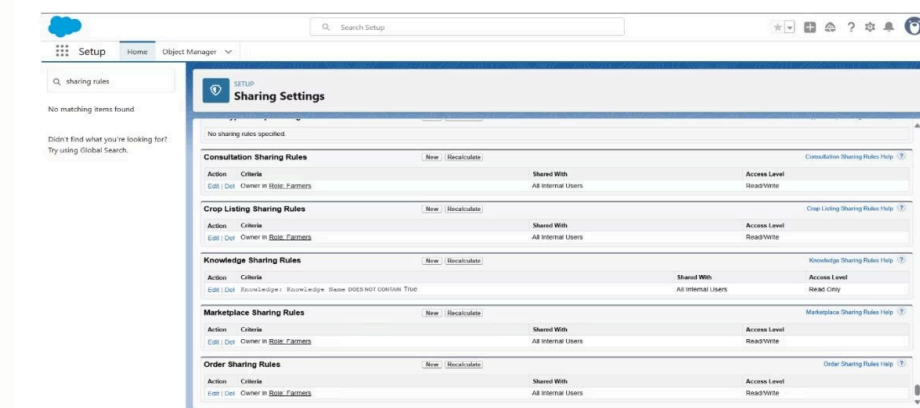
- Go to **Setup** → **Security** → **Sharing Settings**
- Set OWD as:
- Rooms** → **Public Read-Only**
- Reservations** → **Private**
- Guest Details** → **Private**
- Ensures security of guest data



# Step 10: Sharing Rules & Step 11: Login Access Policies

## Sharing Rules

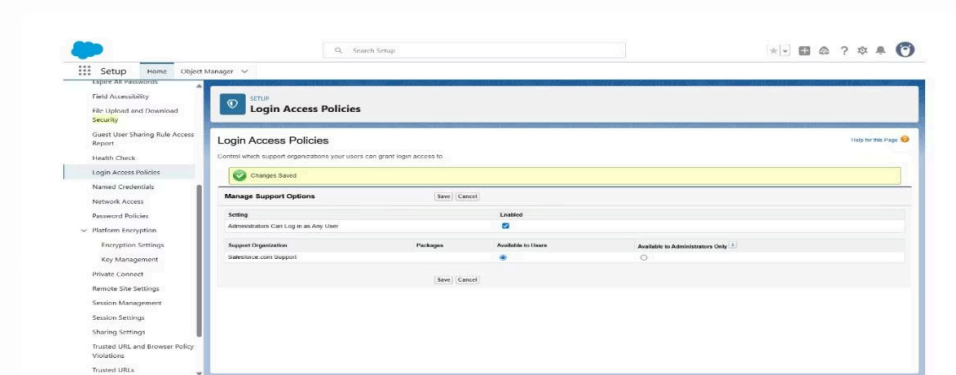
- ? Go to **Setup** → **Security** → **Sharing Settings** → **Sharing Rules**
- ? Created rule:
- Share **Guest Reservation Records** → With **Hotel Managers** → Access: Read/Write
- ? Created rule for **Room Data** → Shared with **All Receptionists**



Sharing Rules: Managers can see all bookings.

## Login Access Policies

- ? Go to **Setup** → **Security** → **Login Access Policies**
- ? Enabled:
- **Admin Login Access** for troubleshooting
- **Business Hours Restriction** for selected users



Login Access Policies: Restrict by business hours.

## Conclusion

In Phase 2 of the Hotel Reservation System, the Salesforce Org was successfully configured with essential settings. We set up the company profile, business hours, fiscal year, and created users, roles, and profiles to define access. Security was ensured through OWD, sharing rules, and permission sets. A sandbox and deployment setup were prepared for safe testing and migration. Finally, key custom objects (*Room*, *Reservation*, *Payment*, *Feedback*) were created to establish the core data model for comprehensive hotel management.